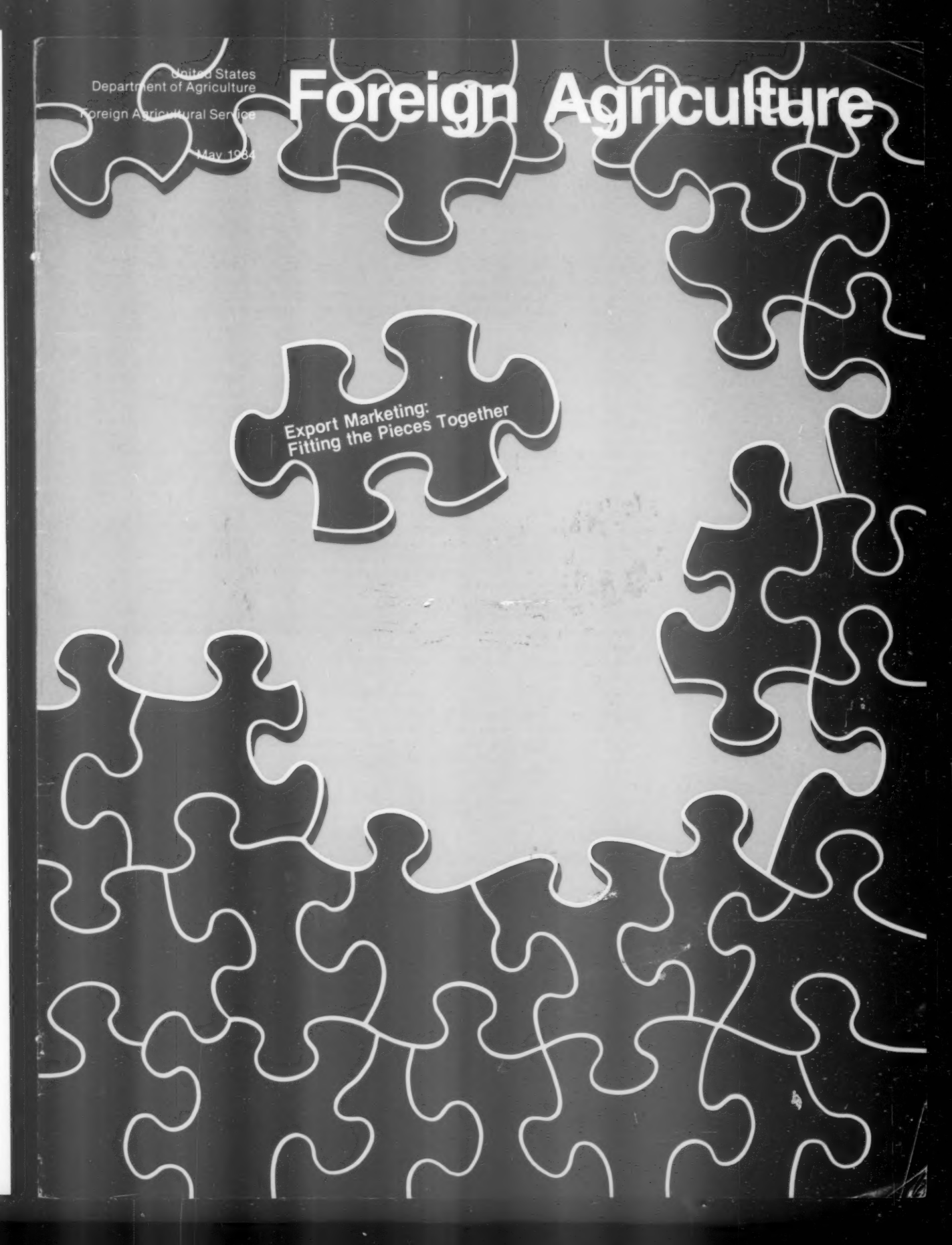
United States
Department of Agriculture
Foreign Agricultural Service

May 1984

Foreign Agriculture



Marketing News

U.S. Hardwood Industry Exhibiting in Europe

The U.S. hardwood industry will exhibit its products at the Trieste, Italy, international fair June 17-29. The **National Lumber Exporters Association** and the **American Plywood Association** will conduct seminars and have displays at the Trieste fair, where many other U.S. trade associations and companies from a variety of industries will be participating. A special feature of the 1984 fair will be an American Wood Day. The 1983 fair attracted 90,000 visitors.

Hardwood Industry Completes Far East Trade Mission

Representatives of the U.S. hardwood industry recently returned from a highly successful trade mission to Japan and Taiwan. The timing of the mission was excellent, particularly in Japan, which is beginning to experience certain hardwood shortages because hardwood log supplies from Indonesia and Malaysia gradually are being cut off. In addition, a shortage of Japanese-grown hardwoods is developing. Japanese contacts predicted that demand for U.S. hardwoods, estimated to be $38-$40 million in 1983, would double this year. White oak, red oak, cherry, maple and alder are the most popular U.S. hardwood species in Japan.

Since much of the furniture manufactured in Taiwan is exported to the United States, the greatest interest in the Taiwan market was for those species that are popular in the U.S. market, namely red oak, white oak, maple and alder. Team members met with furniture manufacturing and wood importing associations in both countries and visited furniture, plywood, veneer and flooring plants. All the business reps the team met were eager to learn of U.S. sources of supply.

The U.S. industry was represented by the **National Lumber Exporters Association, the Fine Hardwoods/American Walnut Association, the Appalachian Hardwood Manufacturers Association, Coastal Lumber Company and Fitzpatrick and Weller**. The group spoke for the industry as a whole, rather than for specific products, regions or species.

European Lumber Representative Appointed

The two major U.S. softwood lumber associations, the **Southern Forest Products Association** and the **Western Wood Products Association,** have selected Robert R. Kincaid as the U.S. softwood industry's European representative. Kincaid, based in London, is responsible for promoting U.S. softwood lumber products throughout Europe.

Kincaid comes to this position from the "Southern Pine Bulletin," a newsletter he established as an information source for users of southern pine products. He had previously worked for several U.S. wood products companies. Kincaid arrived in London in February and is located at 69 Wigmore Street, London W1H 9LG, England.

The new softwood lumber office is being supported under the National Forest Products Association/Foreign Agricultural Service market development program. Other overseas offices include plywood representatives in London, Antwerp and Hamburg, a hardwood representative in Hamburg and a western wood products official in Tokyo.

Wheat Associates Names Assistant Director in Morocco

U.S. Wheat Associates (USW) recently appointed John Howard as assistant regional director of U.S. Wheat's office in Casablanca, Morocco. He will assist Rick Row, the regional director, in a variety of wheat market development activities in Morocco, Algeria, Tunisia, Nigeria and several other West and East African countries. Prior to joining U.S. Wheat, Howard was with American Rice Inc. and the Rice Council for Market Development.

The Magazine for Business Firms Selling U.S. Farm Products Overseas

Published by
U.S. Department of Agriculture
Foreign Agricultural Service

Managing Editor
Aubrey C. Robinson

Design Director
Vincent Hughes

Writers
Robb Deigh
David Garten
Lynn A. Krawczyk
Edwin N. Moffet
Geraldine Schumacher

Production Editor
Evelyn Littlejohn

Text of this magazine may be reprinted freely. Photographs may not be reprinted without permission. Contact the design director on (202) 447-6281 for instructions. Use of commercial and trade names does not imply approval or constitute endorsement by USDA or the Foreign Agricultural Service. The Secretary of Agriculture has determined that publication of this periodical is necessary in the transaction of public business required by law of this Department. Use of funds for printing *Foreign Agriculture* has been approved by the Director, Office of Management and Budget, through March 31, 1987. Yearly subscription rate $16.00 domestic, $20.00 foreign, single copies $2.75 domestic, $3.45 foreign. Order from Superintendent of Documents, Government Printing Office, Washington, DC 20402.

Features

Mexico: A Market To Watch 4

U.S. farm exports to Mexico increased 19 percent last year, reaching almost $2 billion. Even so, there are problems in tackling this market.

Selling Grains, Oilseeds and Livestock to Mexico 8

Tapping sales opportunities south of the border requires an understanding of Mexican trade procedures.

Scientific Exchanges Benefit U.S.-Mexican Farm Trade 10

Longstanding scientific cooperation with Mexico is part of a solid U.S. agricultural trading relationship with that country.

Marketing U.S. Farm Goods in Mexico's Free Zones 12

Despite economic problems, importers in Mexico's free zones will continue to buy U.S. farm goods.

Market Opportunities for U.S. Soybean Sales 19

U.S. soybean exports have jumped dramatically over the past 20 years and there are important markets to watch for future sales.

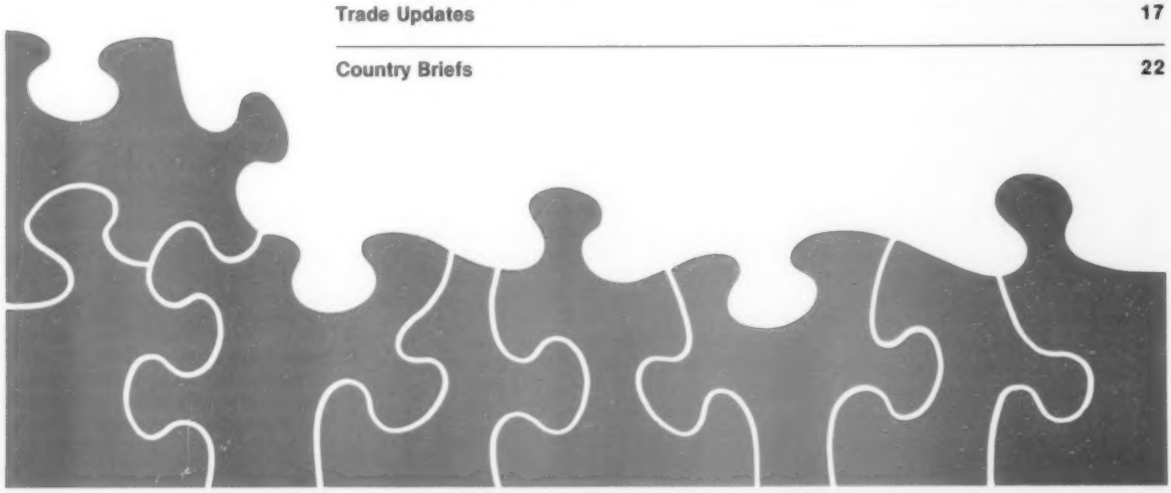
Departments

Marketing News 2

Fact File: Meat Import Law 15

Trade Updates 17

Country Briefs 22



Mexico: A Market To Watch

Black Star

With purchases of U.S. farm products running close to $2 billion last year, Mexico is obviously a market for U.S. agricultural exporters to keep tabs on.

The principal U.S. agricultural exports to Mexico are cereals, oilseeds and products, fats and tallow, fruits and vegetables, hides and skins, live animals and meat and products.

Cereal and oilseed imports account for half of all U.S. agricultural sales to Mexico, with livestock products taking another fourth of the total value.

The most rapidly growing sector has been oilseeds and imports could again hit high levels in 1984 if strong prices continue throughout the year.

However, U.S. exporters should be aware of a number of possible problems and pitfalls in trading with Mexico.

Economic Problems Slow Imports

Mexico's ability to expand imports has become strained because of slow economic growth and foreign earnings increasingly allocated to pay the country's huge foreign debt, now estimated at over $80 billion. However, nonagricultural imports, which account for about 85 percent of the total, tend to bear the heaviest burden of reduced imports.

To help Mexico overcome these economic problems, the United States extended $1.3 billion in Commodity Credit Corporation GSM-102 loan guarantees to U.S. banks to encourage the sale of agricultural products to Mexico in fiscal 1983. An additional $790 million in credit guarantees has been extended in fiscal 1984.

The Mexican government appears to be committed to maintaining adequate food supplies for its rapidly expanding population, although some higher valued—and more income-elastic—commodities will decline in demand. These include meats, dairy products, fruits and complementary products such as feed grains.

Mexico's agricultural import policy has long reflected a strong desire to import only what is required to assure adequate domestic food supplies.

An import license specifying the quantity involved is required for nearly all food products. Mexico is reluctant to issue import permits for products which compete with domestic production, unless that production is insufficient to meet demand.

Before approving a request for import permits, the Mexican government consults domestic producers of the same or similar products. Generally, the perception of what products compete with domestic production is quite liberal. A request for an import permit will often be rejected if the product is even remotely similar to a domestically produced one.

Because requests for import permits are frequently refused or, if granted for one shipment, may not be issued for subsequent shipments, importers sometimes are reluctant to invest the time, money and effort required to file for such a permit.

In addition to this problem, many Mexican importers have been inundated with vis ts and inquiries from exporters and it can be difficult for U.S. exporters to get appointments with them.

Careful Planning a Must

If you are planning a trip to Mexico to contact buyers of agricultural products, the following suggestions and information may make your trip more productive.

—Learn what items are currently being imported. Most basic commodities such as grains, oilseeds, beans, and nonfat dry milk, are purchased on a tender basis by the government.

—Contact the agricultural counselor's office before making tra el preparations. The office can provide you with information on the importability of the products you are selling and on the likelihood of contacting Mexican importers. The counselor's office also can make appointments with Mexican officials or traders for official U.S. trade missions, such as those sponsored by state departments of agriculture or commodity associations. It cannot make such appointments for individuals.

Black Star

—Keep in mind that Mexican officials have no obligation to meet with any mission or group, even if the appointment has been requested through the U.S. Embassy.

—State trade missions and commodity association groups should coordinate their travel plans through the appropriate commodity division of the Foreign Agricultural Service (FAS) in Washington, D.C. or with the FAS Western Hemisphere area officer (Tel. 202 475-4061).

—Trade teams with similar interests should not schedule trips too closely together. Because such trips frequently require special meetings with government officials and trips to producing, processing and distribution sites, close, repetitive arrangements with the same persons can be counterproductive.

—No more than three appointments a day should be planned. The working hours of most offices are approximately 10 a.m. to 3 p.m. and 5 p.m. to 7:30 p.m.

—Field trips to producing areas are very difficult except in unusual circumstances. Some dairy and poultry establishments can be visited during a full-day excursion, but major livestock producing areas and nearly all crop areas are far from Mexico City and require travel through the mountains.

—Communication in Spanish with Mexican contacts will receive a much more favorable response. Make arrangements for an interpreter if necessary. The major hotels often can provide or recommend interpreters. The Embassy does not offer this service.

—Generally, the same import requirements apply to imports of product samples as to commercial shipments. This means that an import license must be obtained and duties paid on samples. In some cases health permits must also be obtained.

The Embassy can assist official trade missions bringing in product samples, but only for Embassy-sponsored functions. To do so, the counselor's office must receive—at least two months before arrival—information concerning the type and quantity of samples to be brought into Mexico in order to request a free-entry permit.

Participants in trade shows can bring in product samples only if the show organizers obtain import permits for them. Before paying exhibitor fees, firm assurance should be obtained from the organizers that they will assist in importing samples. Small quantities of samples carried in personal baggage may be allowed into Mexico at the discretion of the Mexican customs officials. ■

Despite Peso Problems Some Commodities Still Sell Well

The economic crisis has significantly reduced the number of products imported into Mexico from the United States. However, the following commodities are still imported by Mexico and are expected to recover their market potential over the next few years.

Livestock and Livestock Products

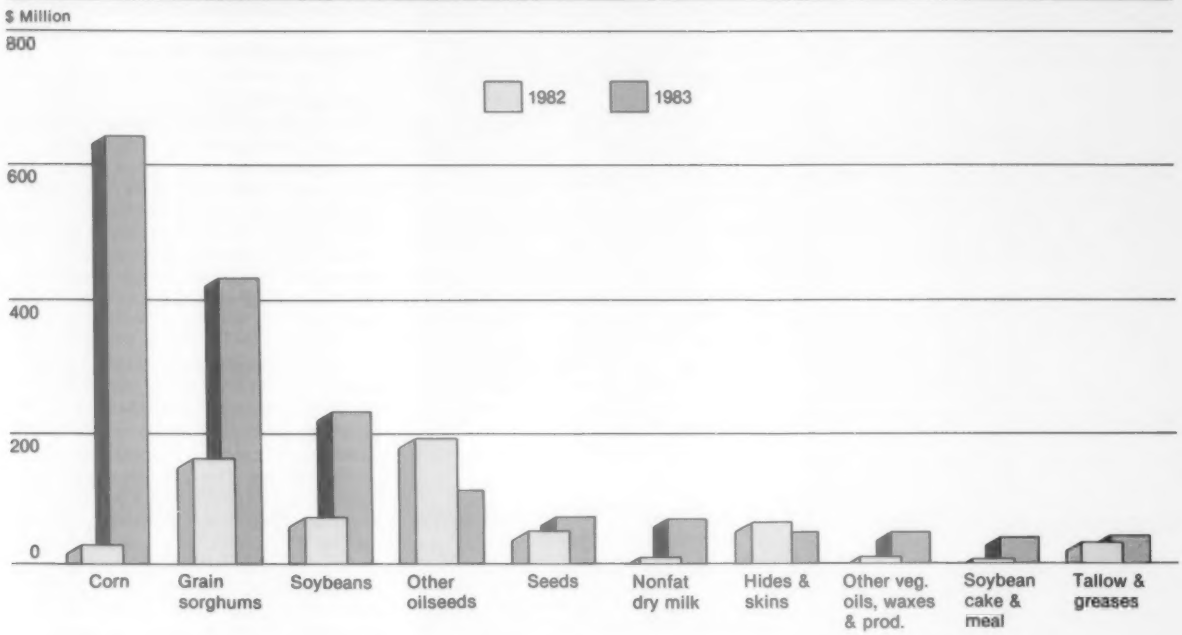
Beef breeding cattle
Dairy breeding cattle (Holstein and Brown Swiss in particular)
Sheep
Swine, purebred
Horses, purebred
Baby chicks
Offals, edible
Tallow
Lard
Semen
Hides and skins (raw)
Nonfat dry milk
Whey
Lactose
Poultry meat (free zones only)
Eggs for hatching

Crops

Corn
Wheat
Sorghum
Barley
Rice
Beans, dry
Soybeans and soy products
Cottonseed
Sunflowerseed
Nuts (free zones only)
Fruits, fresh (apple, pears, citrus, plums and grapes, into free zones only)
Fruits, dried (prunes, raisins)
Fruit juices (free zones only)

This article was prepared by the Office of the U.S. Counselor for Agricultural Affairs in Mexico City. Tel. (905) 211-0042, Ext. 3753.

U.S. Farm Exports to Mexico Rose 68 Percent in 1983



FAS Staff in Mexico Works To Expand U.S. Exports

The Counselor for Agricultural Affairs at the U.S. Embassy in Mexico City represents U.S. agricultural interests and works to expand U.S. agricultural exports to Mexico.

The counselor's staff reports on trade and agricultural policy, promotes markets for U.S. agriculture and analyzes agricultural production and markets.

The staff continuously reviews Mexican agricultural policies and programs and, through the ambassador, advises USDA officials and other interested U.S. government agencies on problems and opportunities created by those policies and programs.

The Embassy's agricultural staff carries out a wide range of market promotion and development activities and helps put potential buyers in Mexico in touch with U.S. agricultural exporters.

FAS sponsors trade shows in Mexico featuring U.S. food and agricultural products such as the National Livestock Show in September, in-store promotions of U.S. foods, and U.S. sales team visits to Mexican buyers.

In addition, FAS promotes exports through a joint market development program in cooperation with more than 50 agriculturally oriented, nonprofit associations—called market development cooperators.

The cooperator program provides trade servicing to help Mexican buyers choose the right U.S. product and use it efficiently. This is usually used to encourage sales of bulk, unprocessed commodities. Cooperator and state groups representing producers of semiprocessed and processed products also carry out direct promotion campaigns.

The agricultural counselor's staff in Mexico works closely with more than 20 cooperators in a wide variety of these promotional and technical assistance activities.

Three cooperator groups—U.S. Wheat Associates, American Soybean Association and U.S. Feed Grains Council—have offices in Mexico City, reflecting the importance of Mexico as a market for their products.

To contact the agricultural counselor write to:

Counselor for Agricultural Affairs
American Embassy Mexico
P.O. Box 3087
Laredo, TX 78041
Telephone: (905) 211-0042,
Ext. 3753, 3751 or 3752.
Telex: 01773091 or 01775685.

Selling Grains, Oilseeds And Livestock to Mexico

By John E. Montel

Interest in Mexico as a market for U.S. agricultural products has grown markedly in recent years. As its agricultural production lags behind domestic demand, Mexico will continue to import large quantities of grains and oilseeds. The two-way flow in livestock and products also is quite substantial. To take advantage of sales opportunities, it is important for American sellers to understand Mexican trade procedures.

The Mexican government traditionally has exercised strict control over the import of agricultural products. Permits or licenses are required for virtually all food, agricultural and livestock imports. All applications for import licenses must be filed by the Mexican importer with the Mexican Secretariat of Commerce.

In the past, CONASUPO—the government buying agency for basic commodities—has acted as the sole importer of grains, oilseeds and products. Its predominance in agricultural imports expanded even further as a result of Mexico's current economic crisis. Tighter import controls and exchange restrictions beginning in late 1982 have severely restricted imports of products not handled by CONASUPO.

Further, the use of Commodity Credit Corporation credit guarantees for a large share of Mexico's agricultural import needs has led to an expanded role for CONASUPO and other agencies involved with Mexican import policy. For three years prior to 1983, CONASUPO held its public tenders in Washington, D.C. Following the onset of the economic crisis, the tenders were moved to Mexico City—partially as a means to cut administrative costs. For now, these tenders continue to be held in Mexico City.

The Ministry of Commerce has established committees to control imports of all basic agricultural commodities. These committees consist of one representative of the Secretariat of Commerce, one from CONASUPO, and one from the appropriate private trade association. The committees provide the framework for the formulation of all import decisions, and purchase in the name of and for the account of the private industrial sector.

Selling Grains and Oilseeds

CONASUPO continues to import certain quantities of oilseeds and grains to supply firms operating under public management and very small private processors. Although most purchases are now made on a tender basis, the Mexican government prefers to secure imports on a government-to-government basis or by direct negotiations with foreign private suppliers whenever possible.

U.S. grain suppliers who wish to offer their products to Mexico, particularly those not represented in Mexico, are encouraged to participate in CONASUPO tenders by obtaining a representative. The U.S. Department of Agriculture, in cooperation with the Mexican government, assists by notifying the U.S. trade of such opportunities. Only firms which are registered with and authorized by the Mexican government are eligible to participate in such purchases. In most cases, U.S. grain suppliers employ an experienced Mexican agent to represent them.

Under special circumstances, the Mexican government may negotiate directly with U.S. suppliers or grant a commission to a private company to import directly. In these situations, the U.S. Embassy in Mexico City can serve as a source of information for the importer.

U.S. companies interested in exporting grains and oilseeds to Mexico may write to the Office of the Counselor for Agricultural Affairs at the Embassy (see page 7), indicating which commodities they wish to export to Mexico. This information is then provided to the Mexican government and private individuals upon request.

Selling Livestock

Livestock may be imported into Mexico by private buyers or by government agencies. Well-established private

importers—including producers themselves—often travel to the United States to select and purchase livestock.

Many importers have purchased cattle in the United States before and have developed a business relationship with people in the U.S. cattle industry.

Buyers and sellers who have not established such a relationship can be brought together in several ways. One is to work through one of the many private U.S. livestock export firms who will make the contact and sale. Another is for American suppliers to advertise their animals in "CONTACTS for U.S. Farm Products," a monthly newsletter published by FAS. Subscription information is available from your State Department of Agriculture marketing representatives.

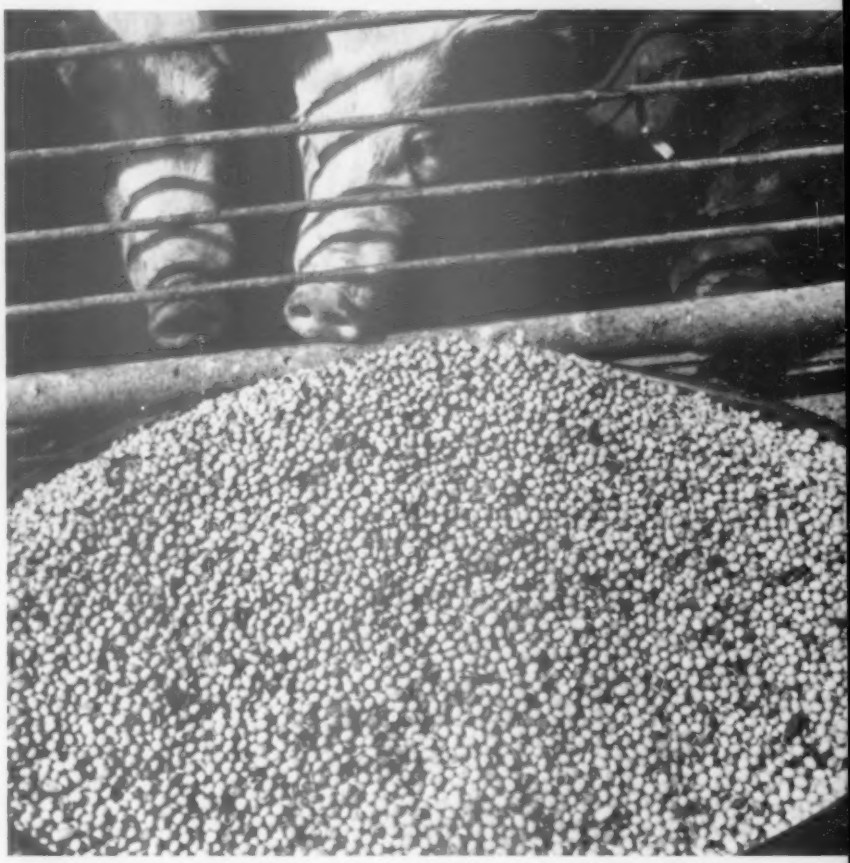
Also, upon written request, the office of the U.S. agricultural counselor at the U.S. Embassy in Mexico City will provide a list of Mexican producers, importers, government agencies and others involved in livestock trade.

Establishing U.S. Contacts

Mexican cattlemen who wish to establish contacts in the United States also have several options: They can enlist the services of Mexican importers who have already established links with U.S. suppliers; they can request assistance from their domestic breed associations; or they can use the service of the agricultural counselor's office either to obtain lists of U.S. suppliers or to advertise their request through USDA's Trade Opportunity Referral System (TORS).

For more information about TORS, contact the Export Promotion Division, FAS, (202) 447-7103.

When sales contracts are negotiated, animals still cannot be shipped into Mexico until all import requirements are met and the importer has been issued a valid import license. The fulfillment of these requirements is the responsibility of the Mexican importer or a designated representative.



The exporter, however, must meet U.S. government health regulations for shipment of animals within the United States and across the border. Exporters should contact USDA veterinarians in their area for more details on this requirement.

Provisions for Payment

To avoid problems and delays at the border, the negotiated sales contract should provide for payment prior to shipment of animals by one of the following means: (1) a direct transfer of money by wire, called an "order of payment," (2) a bank draft on a U.S. bank delivered to the seller prior to shipment, or (3) an irrevocable confirmed letter of credit. Although less desirable, payment at the border may be requested when purchases are made by a government agency such as the Banco de Credito Rural.

In all cases, the seller should ensure that deliveries meet the terms and specifications outlined in the purchase order. ■

The author is the U.S. Counselor for Agricultural Affairs in Mexico City. Tel. (202) 211-0042.

Scientific Exchanges Benefit U.S.-Mexican Farm Trade

By Marjorie B. Salwin

Trading relationships between the United States and Mexico not only involve agricultural commodities, but extend into scientific fields as well.

A good example of this is the long-standing U.S. scientific cooperation with Mexico, the fourth largest importer of U.S. agricultural products last fiscal year.

For over a decade, U.S. and Mexican agricultural specialists have worked together under a science and technology exchange program. Their efforts have covered tropical agriculture, crop forecasting and animal health. Exchanges have also dealt with soil conservation, plant germplasm, forestry, pest control and nutrition.

USDA's Office of International Cooperation and Development coordinates the program with Mexico and similar exchanges with more than 20 other nations.

Under the program, U.S. scientists share their expertise, develop new technology, improve relations with the other nations and help promote the sale of U.S. agricultural commodities.

U.S. scientists have collected germplasm from other countries to breed hardier and more versatile crops. They have brought beneficial insects back to the United States to prey on pests that destroy millions of dollars worth of crops. They have also helped resolve trade problems and disagreements over quality standards.

Researchers Work To Eradicate Plant Disease

Projects proposed under a new exchange agreement recently signed with Mexico hold great promise for increasing production and keeping crops disease-free. In fact, a research program with Mexico to eradicate karnal bunt disease in Mexico is already underway.

Karnal bunt, a serious soil-borne wheat disease, recently broke out in Sonora, Mexico—the first reported infestation in the Western Hemisphere. The disease has caused tremendous losses in India, Pakistan, Iraq and Afghanistan where it originated.

If karnal bunt were to become established in the United States, it could cost millions of dollars in damage to U.S. farmers. Through the cooperative U.S.-Mexican effort, scientists hope to eradicate the disease in Mexico and to prevent its spread across the border.

Cotton, the fourth most important cash crop in the United States and a significant export, may get new and hardier breeding stock as a result of ongoing exchanges. Cotton thrives in tropical and subtropical regions, and many useful strains with natural resistance to disease and insect pests grow wild in Mexico.

Under the exchange program, U.S. plant geneticists have examined and selected cotton seeds with desirable growing characteristics in Mexico. The seeds were cultivated by cooperating scientists in Mexico, where the growing season is more favorable for raising cotton plants and for increasing the supply of seeds.

The U.S. scientists returned to Mexico to evaluate the plants and to bring seeds to the United States. These seeds carry the promise of an improved cotton crop for U.S. growers.

Cattle Management Also Under Study

The livestock industry also may benefit from ongoing exchanges with Mexico. Scientists are studying more efficient ways to manage purebred U.S. Holstein dairy cattle in the humid tropics of Mexico to increase productivity. As they discover ways to counter heat stress in these prized animals, fluid milk production will rise and overhead costs will fall.

Mexican cattlemen will have the opportunity to see that high-grade cattle can be relatively more efficient than their traditional breeds. This could help open a potentially large market for U.S. exporters of high-quality dairy cattle in Mexico and in other areas with similar climates.

Domestic Rubber Production Another Research Goal

U.S. and Mexican scientists also are studying guayule, a desert plant which has the potential to make the United States self-sufficient in natural rubber production.

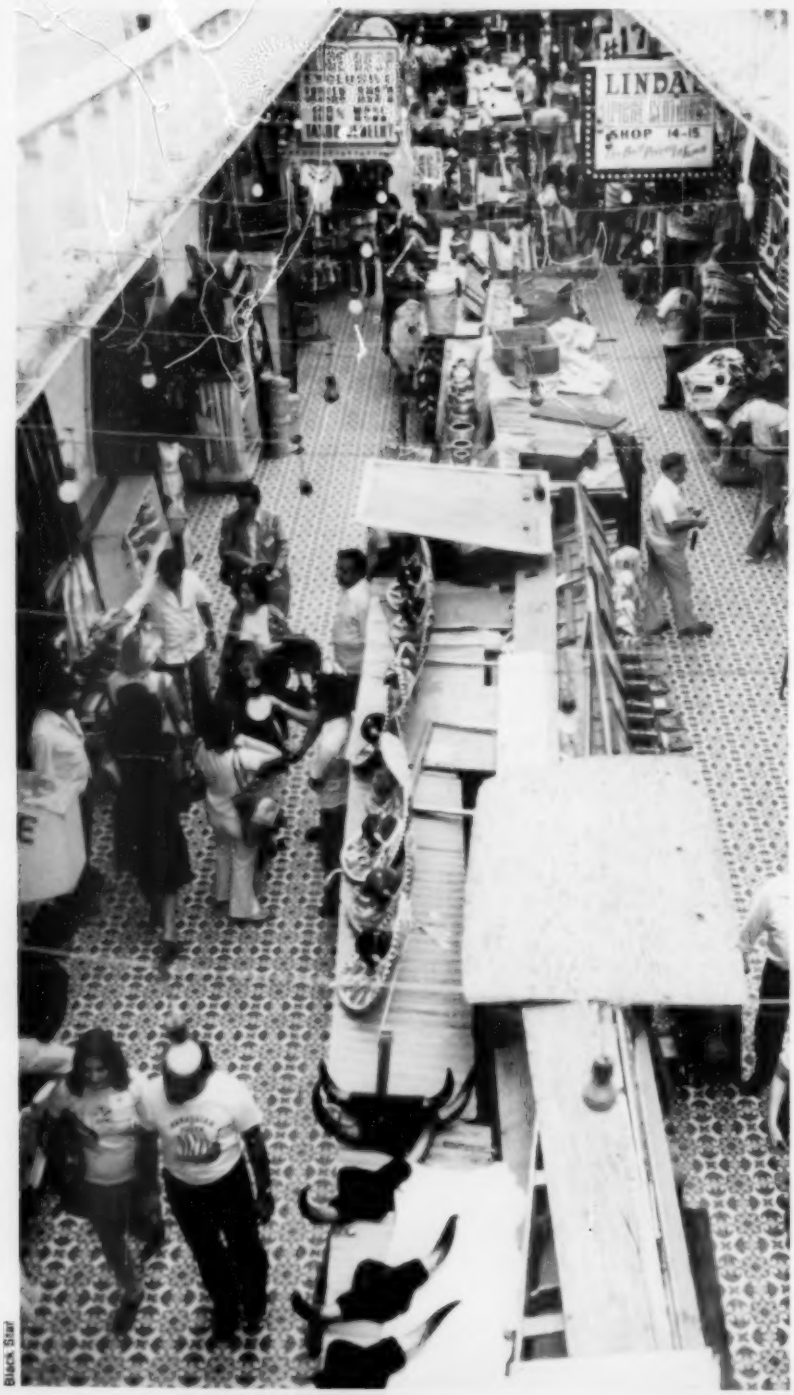
Technology is needed to produce, process and store high-quality seed from the guayule plant and to obtain vigorous seedlings. This research project could yield the information needed to boost commercial production in the United States.

In addition to the obvious tangible benefits to U.S. agriculture of projects such as these, the scientific exchanges build good relationships between foreign and U.S. researchers and are priceless catalysts for worldwide agricultural research, development and trade

Such efforts lead to greater understanding of the special needs and problems of agriculture and the food industry in climates, soils, and different traditions. This knowledge also provides exporters with excellent information about the unique needs of potential customers around the world. ■

The author is with USDA's Office of International Cooperation and Development. Tel. (202) 475-4769.

Marketing U.S. Farm Goods In Mexico's Free Zones



Black Star

By John E. Montel

Despite the recent devaluation of the peso, Mexican importers in the free trade zones will continue to purchase a significant quantity of consumer goods over the next several years.

Numerous food and agricultural products, normally prohibited entry into Mexico's interior, may enter at designated areas known as free zones and, in many cases, be exempt from customs' duties.

Problems with the peso in 1982 led the De La Madrid administration to tighten up on the type and quantity of commodities which are permitted to enter free zones. Initially, the amount of trade in the free zones dropped sharply.

A gradual increase, however, was noted during the last half of 1983, and private sector brokers are optimistic about the future.

The commodities most likely to be in high demand in the Mexican free zones are: dried or canned fruits and vegetables, processed milk, feed grains (sorghum), hay, oilseeds and beans, as well as seed potatoes and corn seed.

The free zones of most interest to U.S. exporters are the areas of Baja California and the northern border. Because of their proximity to the United States and their distance from the interior of Mexico, these regions continue to have strong commercial ties with the United States.

On Mexico's southeastern tip, the state of Quintana Roo, containing the meccas of Cancun and Cozumel, also has the potential of being a good free-zone export market for U.S. food products. Bear in mind, however, the state's

distance from the United States increases transportation cost and affects the price of U.S. agricultural goods.

Breaking Into The Free Zones

The first step in exporting to the Mexican free zones is to contact an authorized importer.

The potential importer in the free zone must then submit an official request to authorities in Mexico City for a permit to import the specific product. Import permits are required for virtually all food, livestock and agricultural products. Checkpoints inside the free zones inspect all vehicles to insure that they do not illegally transport food items outside the free zones to the interior.

It usually takes four to six weeks before the importer receives the license, but the lag may vary with the product and the supply and demand situation.

Import permits can be processed and issued locally for a few selected products. However, unexpected surges in demand for a given product may override the system and its procedures.

Bigger Firms Have Better Luck

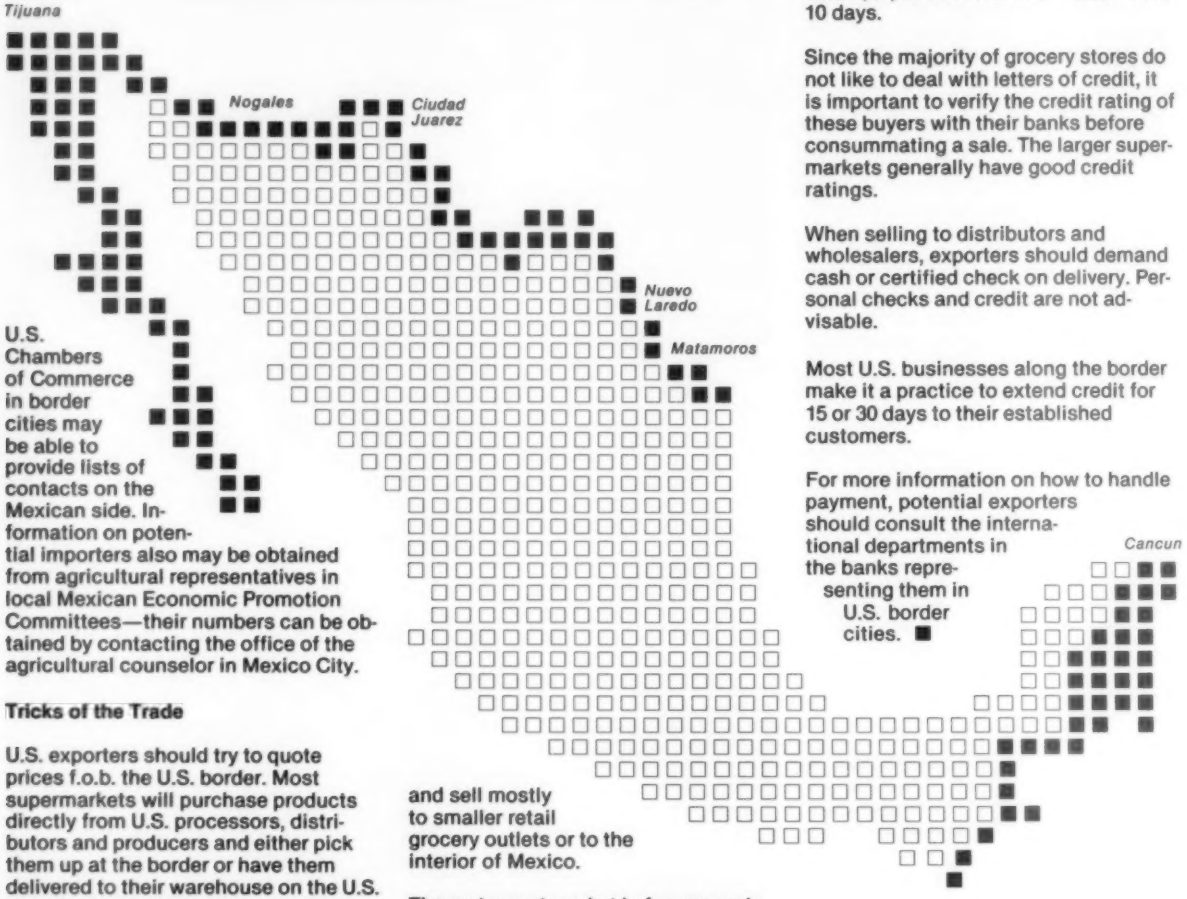
No matter how the actual trade is accomplished, the system favors the larger U.S. exporters. Small exporters must be prepared to weather fierce competition.

Established warehouse operations hold the competitive edge because they have long-term storage facilities and are able to sell any quantity throughout the year, frequently at a large discount.

Contacts are another important aspect of U.S.-Mexican trade. Mexican importers are usually unwilling to jeopardize lengthy business relationships by buying from new suppliers unless prices and services are extremely attractive.

Black Star

Mexican Free Zones ■



U.S. Chambers of Commerce in border cities may be able to provide lists of contacts on the Mexican side. Information on potential importers also may be obtained from agricultural representatives in local Mexican Economic Promotion Committees—their numbers can be obtained by contacting the office of the agricultural counselor in Mexico City.

Tricks of the Trade

U.S. exporters should try to quote prices f.o.b. the U.S. border. Most supermarkets will purchase products directly from U.S. processors, distributors and producers and either pick them up at the border or have them delivered to their warehouse on the U.S. side. Supermarkets also use customs brokers to store goods and transport them across the border.

Meat markets and fruit and vegetable markets usually purchase their imports from border brokers and distributors, either U.S. or Mexican. Some commodities, such as animal offals, pinto beans, apples, pecans and potatoes, are purchased directly from suppliers on the U.S. side.

Mexican buyers and distributors purchase direct from U.S. suppliers and sell mostly to smaller retail grocery outlets or to the interior of Mexico.

The restaurant market in free zones is very large. Except for some specialty items, however, U.S. exports to this market have had limited success. Most restaurants buy their fresh food products from local markets.

Since most major importers maintain accounts with U.S. banks, payment is often by personal check or certified check drawn on U.S. banks. Other methods of payment include an "order of payment" or an "irrevocable confirmed letter of credit."

Most U.S. exporters receive payment upon delivery of goods. However, some of the larger supermarkets must process orders through their accounting departments before checks can be drawn, a process which can take five to 10 days.

Since the majority of grocery stores do not like to deal with letters of credit, it is important to verify the credit rating of these buyers with their banks before consummating a sale. The larger supermarkets generally have good credit ratings.

When selling to distributors and wholesalers, exporters should demand cash or certified check on delivery. Personal checks and credit are not advisable.

Most U.S. businesses along the border make it a practice to extend credit for 15 or 30 days to their established customers.

For more information on how to handle payment, potential exporters should consult the international departments in the banks representing them in U.S. border cities. ■

The author is U.S. Counselor for Agricultural Affairs in Mexico City. Tel. (905) 211-0042.

Fact File

Meat Import Law

Beef imports currently account for roughly 7 percent of U.S. beef consumption. Of these imports, roughly 85-90 percent is fresh frozen beef imported for manufacturing use (i.e., to be blended with U.S. fat trimmings for grinding into hamburger). Before the 1940s, in the late 1950s and early 1960s, the United States produced enough of this type of beef so that imports were insignificant. But as dairy cow numbers declined and domestic demand grew, so did imports. A meat import law was passed in 1964 to regulate these larger imports. This law was later revised into the current U.S. Meat Import Law, enacted Dec. 31, 1979.

Meat Import Act of 1979

The Meat Import Act of 1979 provides for the imposition of import controls on certain fresh, chilled and frozen beef, veal, mutton and goat meat products. Like its predecessor, the 1979 law mandates quantitative import controls if imports are expected to exceed 110 percent of a formula-derived quantity. The most widely publicized feature of the 1979 Act is its countercyclical approach to computing the allowable import level. Thus, the formulas provide that as U.S. production is high, imports tend to lessen; when domestic production falls, imports will tend to rise. Under the old law, both imports and production tended to move together.

Import Estimates and Controls

Before January 1 of each year, the Secretary of Agriculture must publish an adjusted base quantity for the coming year's imports. This quantity is computed on the basis of past U.S. production levels and projections for the coming year. The Secretary also publishes quarterly estimates of the quantity of meat products covered by the Meat Import Act that would enter the United States during the year without the imposition of limitations under the law.

If the USDA's estimate of imports in the absence of quotas equals or exceeds 110 percent of the base quantity, the President must announce import limits equal to the adjusted base-quantity level unless this is less than the minimum provided in the Act. The Secretary of Agriculture allocates country shares of the U.S. market within this global total on the basis of these countries' shares during a previous representative period. Consideration also is given to special factors affecting meat and cattle trade. These allocations are then certified to the Secretary of the Treasury, who has responsibility for their implementation.

Adjusted Base Quantity Formula

The Meat Import Act of 1979 provides for a basic import level of 1,204.6 million pounds (product weight) of meat products covered in the law. This base quantity (which is the average import level during 1968-77) is modified annually by two figures: a production adjustment factor and a countercyclical factor.

$$\text{Base quota} \times \text{growth factor} \times \text{countercyclical factor} = \text{Adjusted base quota}$$

$$\text{Adjusted base quota} \times 1.1 = \text{Trigger point}$$

$$\text{Base quota} = 1{,}204{,}600{,}000 \text{ pounds}$$

$$\text{Growth factor} = \frac{\text{Three-year moving average}^1 \text{ of domestic quota meat production}}{\text{Ten-year average of domestic quota meat production, 1968-77}}$$

$$\text{Countercyclical factor} = \frac{\text{Five-year moving average}^1 \text{ per capita supply of domestic cow beef}}{\text{Two-year moving average}^1 \text{ per capita supply of domestic cow beef}}$$

Presidential Flexibility

The President has limited authority to suspend limitations of the Meat Import Act. When the countercyclical factor is 1.0 or greater (which occurs with declining domestic cow beef supplies), the President can suspend limitations on meat imports or increase the import level by proclaiming that the action is required by overriding economic or national security interests, or in such limited supply that prices are unreasonable.

[1] Moving averages include year being estimated plus preceding two, three, or five years.

The President must publish a statement of intent to lift the import limitations in the Federal Register and allow a 30-day comment period before the action. The President also may suspend limitations if trade agreements entered into after Dec. 31, 1979, will ensure that the imports will not exceed the adjusted base quantity level for the year.

When the countercyclical factor is below 1.0 (when domestic cow beef supplies are ample), the President's authority to suspend limitations is further restricted. Limitations must remain in place except for a case of a declared national emergency or a natural disaster which affects beef supplies.

Voluntary Restraint Agreements

In fact, quotas have only been imposed once—in the fourth quarter of 1976. In past years, when it appeared that imports would exceed 110 percent of the adjusted base quantity under the 1964 Act, the United States negotiated a program of voluntary restraint agreements (VRAs) and exchanged letters with supplying countries to ensure that total imports of meats covered by the law would not exceed the trigger level. This way, the United States has avoided having to impose formal import quotas. Supplying countries, meanwhile, have been guaranteed equitable shares of the largest, practical total volume of imports under the law. Authority for negotiations for VRAs is found in the Agricultural Act of 1956.

Monitoring Imports

The U.S. Customs Service monitors all meat imports subject to the Meat Import Act. When a VRA program is in effect, the Customs Service, on direction from USDA, monitors imports from any country approaching its limit to ensure that they do not exceed the negotiated level.

The Customs Service is responsible for enforcing the USDA regulations implemented to carry out the VRAs. If formal quotas are in place, the Customs Service sees that imports for each country are held to levels determined by the Secretary of Agriculture. Countries not on the allocation list may not export meats covered under the law to the United States as long as import restrictions are in place.

The Foreign Agricultural Service (FAS) publishes a one-page monthly summary of cumulative imports under the Meat Import Law. This is available by subscription from FAS Information Services Division, Tel. (202) 447-7937. For further information on the Meat Import Law, contact the Dairy, Livestock and Poultry Division, Foreign Agricultural Service, USDA, Washington, D.C. 20250.

U.S. Meat Imports Subject to Meat Import Law Dropped in 1983[1]

(In 1,000 pounds)

Country of origin	1982 [2]	1983 [2 3]	Country of origin	1982 [2]	1983 [2 3]
Australia	714,837	601,135	Guatemala	5,237	19,066
Belize	—	—	Haiti	882	662
Canada	124,680	129,998	Honduras	31,737	34,102
Costa Rica	45,525	33,427	Mexico	451	1,318
Dominican Republic	10,244	8,017	New Zealand	348,761	367,877
El Salvador	2,568	3,267	Nicaragua	23,248	28,094
European Community	7,004	11,223	Panama	4,419	11,223
			Total [4]	**1,319,594**	**1,240,086**

1/ Fresh, chilled or frozen beef, veal, mutton and goat meat and certain prepared items from these. Excludes canned meat and certain other prepared or preserved meat products. 2/ Calendar year. 3/ Preliminary. 4/ Data may not add due to rounding.

Trade Updates

U.S.-Japan Reach New Beef-Citrus Accord

Japan has agreed to a substantial increase in its high-quality beef and orange import levels as the centerpiece of a new four-year beef and citrus trade understanding with the United States.

After a year and a half of talks, Japan agreed in April to raise its import quota for high-quality beef by an average of 6,900 metric tons a year for the next four years. As a result, total imports by Japanese fiscal year 1987 (April 1987-March 1988) should climb to 58,400 tons. Under the previous agreement, which expired at the end of March, Japan was committed to raise its high-quality beef imports by about 3,300 tons last year to a total of 30,800 tons.

Annual quota increases for oranges were raised from 5,000 tons under the old agreement to 11,000 tons..As a result, Japanese imports are expected to increase from the 1983 level of 82,000 tons to a 1987 level of 126,000 tons. Also included in the agreement package was a continued expansion of orange juice import quotas—by 500 tons a year—and phased liberalization of grapefruit juice imports.

As a result of the new agreement, U.S. exporters of high-quality beef and citrus should do approximately $400 million in additional business over the next four years.—*David Miller, FAS. Tel. (202) 382-9064.*

Korea Announces Import Liberalization Program

The Korean government on February 28 announced an import liberalization program to be implemented between July 1, 1984, and 1988. Starting this July, Korea will permit imports of such agricultural items as chocolate, beer, lemons and limes. Other items scheduled for liberalization in July 1985 and 1986 include cottonseed oil, margarine, shortening, tomato ketchup, turkey, ham, bacon, soybean oil and canned meat. —*LaVerne Brabant, Agricultural Trade Office, Seoul.*

Morocco Waives Duties on Certain Livestock Imports

Morocco has waived import duties and taxes on hides and skins (formerly subject to a duty of 20 percent ad valorem), frozen semen (30 percent ad valorem) and feed for calves (25 percent ad valorem).—*Forrest K. Geerken, Agricultural Attache, Rabat.*

Little Change in Major Agricultural Markets

Although their rankings have changed slightly, the world's top 10 importers of agricultural products (see table next page for rankings) have remained pretty much the same since 1970, with the sole exception of China which is a relatively recent entrant into the top 10 list. Together, the top 10 buyers imported an average of $145 billion worth of agricultural products during 1980-82, nearly three-fifths of the world total of $247 billion. The United States singlehandedly accounted for about 16.3 percent.

The major growth markets between 1970 and 1980-82 were the less developed countries, primarily those in the Middle East. Saudi Arabia, Egypt and Iraq all shot up dramatically in the import standings during the past decade. In contrast, many centrally planned and West European countries have grown more slowly and consequently their market rankings have sunk.

Most of the growth in U.S. market shares over the past decade has been in the centrally planned counties. The United States accounted for 16 percent of Poland's agricultural imports in 1980-82, up from less than 9 percent in 1970. Likewise, there was a strong gain in the U.S. market share in Romania and the USSR. Most impressive, perhaps, was the gain in U.S. sales to China, where the United States supplied nearly 36 percent of the market versus 16 percent at the start of the 1970s.—*Stacey Levitt and Arthur B. Mackie, Economic Research Service. (202) 447-8457.*

World's Leading Agricultural Markets

1980-82 ranking	Country	1970 ranking	U.S. share of imports	
			1970	1980-82
			Percent	
1	West Germany	2	8.4	7.1
2	USSR	7	0.6	7.8
3	United States	1	—	—
4	Japan	4	29.3	34.6
5	United Kingdom	3	7.1	6.2
6	France	6	5.0	4.8
7	Italy	5	6.2	7.8
8	Netherlands	8	24.9	30.0
9	Belgium-Luxembourg	9	9.2	10.3
10	China	13	15.5	35.6
11	Saudi Arabia	38	12.4	9.2
12	Canada	10	64.7	40.9
13	Spain	14	16.8	31.9
14	South Korea	21	51.1	50.8
15	Hong Kong	17	8.3	12.6
16	Egypt	42	12.5	27.8
17	Switzerland	11	10.1	10.1
18	Poland	19	8.6	16.2
19	Mexico	41	71.9	73.2
20	Taiwan	20	40.2	45.4
21	Iran	52	21.5	3.7
22	Algeria	46	10.8	8.9
23	Nigeria	57	24.5	19.6
24	East Germany	12	1.4	13.7
25	Denmark	28	22.8	6.7
26	Brazil	28	22.8	29.8
27	Sweden	16	7.7	5.7
28	Singapore	22	4.2	7.6
29	Czechoslovakia	15	1.2	4.6
30	Iraq	61	1.7	8.9
31	Venezuela	43	48.9	40.8
32	Austria	23	2.7	1.8
33	Portugal	30	12.2	40.4
34	India	18	38.9	24.5
35	Indonesia	36	55.3	28.0
36	Yugoslavia	25	11.9	13.5
37	Malaysia	26	4.5	7.7
38	Ireland	35	10.3	5.7
39	Libya	54	4.5	0.7
40	Romania	40	12.7	25.4
41	Greece	37	11.7	18.2
42	Norway	27	11.6	15.8
43	Finland	29	4.5	8.0
44	Cuba	32	—	—
45	Morocco	48	27.7	15.0
46	Australia	33	14.2	12.1
47	Kuwait	56	3.3	5.0
48	Hungary	24	5.3	1.0
49	Israel	39	44.0	34.7
50	United Arab Emirates	192	5.1	9.1

Market Opportunities For U.S. Soybean Sales

By Gerald W. Harvey

The tremendous growth in U.S. exports of soybeans and products over the last 20 years is a success story worth repeating.

From $482 million in 1960, the value of U.S. soy exports rose to $7.9 billion in calendar 1983 and is expected to surpass $8 billion this year.

In 1983, the two leading markets, Japan and Western Europe accounted for over half of total U.S. soybean exports.

U.S. exports of soybeans and products to Western Europe in 1983 totaled $3.1 billion, up from $235 million in 1960. The total for Japan reached $1.2 billion last year, compared to only $93 million in 1960.

Two major U.S. competitors, Brazil and Argentina, have also made rapid gains in soybean exports in the last 10 years. However, there is still substantial potential for increasing U.S. soybean exports.

Even though future growth in soy product consumption in Western Europe, Japan and other developed markets will be limited, there is a pressing need for protein and edible oils in many other parts of the world.

The U.S. soybean has an impressive record as an inexpensive and efficient source of protein. Therefore, the primary focus when examining potential markets is on protein consumption. Here is a look at markets which are promising.

Western Hemisphere

There is vast unsatisfied demand in Mexico, the Caribbean and South America for soybean products.

On a per capita consumption basis, soybean meal use in Mexico is only about 20 percent of that in the United States. With a population growing at 2.6 percent per year, Mexico will probably increase consumption of soybeans for animal production and for human consumption as soy protein and oil.

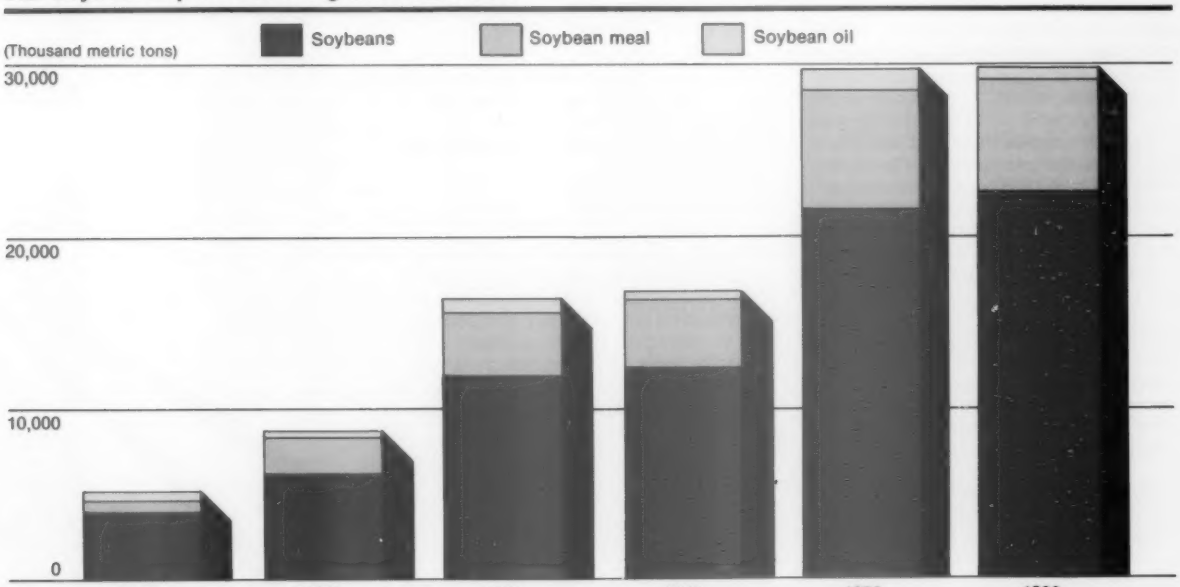
Venezuela is also a significant growth market, as changes in infrastructure and trading practices begin to stimulate the livestock sector. Colombia could be a dynamic trading partner in the soy complex, but protectionist trade policies limit supplies and inhibit livestock production.

Ecuador, and to a lesser extent Peru, suffered seriously from violent weather disturbances caused by the El Nino phenomenon last year. As a result, both countries have recently upped imports of soybeans, meal and oil to compensate for destroyed domestic crops and lower fish catches. Even with normal weather and crops, demand for animal and vegetable proteins will continue to exceed domestic supplies in these countries.

Financial problems are the main constraints to meeting the demand for feed and food proteins in Latin America and the Caribbean.

Even in important soybean-producing countries such as Brazil, Argentina and

U.S. Soybean Exports Show Significant Increase



Paraguay, the pressure to earn foreign exchange forces domestic supplies into world markets.

Brazil, for example, will export significant amounts of soybean meal and oil in 1984, even though domestic soybean meal use on a per capita basis will amount to only about 20 percent of the U.S. level.

Asia

Korea is the most dynamic growth market for soybeans and products in the entire Asian sphere. The Korean government, which has stimulated economic development and encouraged foreign trade, is following rapidly in the economic footsteps of Taiwan and Japan. Demand continues to develop for livestock products, edible oils and soybeans for food uses.

China's market prospects are not so clear cut. Although China possesses the assets required for dynamic economic development, there appears to be a lack of commitment to full participation in international trade. Livestock production in China is still managed largely at the village or farm level. Consumption of edible oils is about one-third that of Japan, and demand for protein for human consumption exceeds supply, especially in the countryside.

If China increased its imports of U.S. soybeans and products, the Chinese livestock and food protein industries could develop rapidly. Southeast Asia, including Malaysia, Indonesia and the Philippines, promises to become an increasingly important destination for U.S. soybeans.

Malaysia and the Philippines have developed new soybean crushing capacities, and consumption will increase as rapidly as financial constraints and technological development permit.

Indonesia will also develop crushing capacity in the years ahead. The country already imports over 400,000 metric tons of soybeans each year for food use. Plans to install soybean crushing and soy oil refining facilities indicate a policy change to encourage expansion of commercial poultry production. Soybean oil can complement domestically produced palm oil and expand its uses and performance.

Burma, with a population over 37 million and a population growth rate of 2.4 percent a year, could increase protein and edible oil supplies with imported soybeans and products if protective policies were eased.

In Thailand, limited soybean production and protectionist policies hold consumption down. Trade policy changes in Thailand could spur use of soy food and feed proteins and oil.

Expansion of shrimp and fish cultivation in almost all countries of Southeast Asia may open up a new market for soybeans. Currently, little soybean product is used in mariculture or aquaculture rations.

The feed used is relatively expensive compared to balanced rations containing soy products. Production increases and intensified competition will bring about pressure to reduce production costs—feed costs in particular. This will favor soy meal, protein derivatives and oil. The potential demand for soy products for shrimp culture alone is estimated at hundreds of thousands of tons each year.

Indian Subcontinent

This area, already the destination for a major share of the world's trade in edible vegetable oils, holds opportunity for expanded oil consumption. The population of the region, which includes Pakistan, India and Bangladesh, is nearly 1 billion people and the per capita oil consumption is still relatively modest.

There is vast opportunity also for development of commercial livestock industries and for consumption of soy foods, in both vegetarian and other diets. A significant share of India's soybean production is already consumed as soy foods.

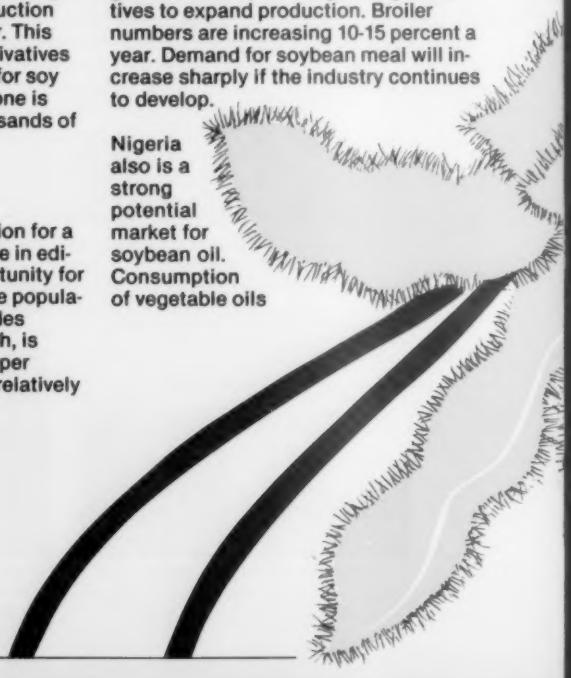
Middle East and Africa

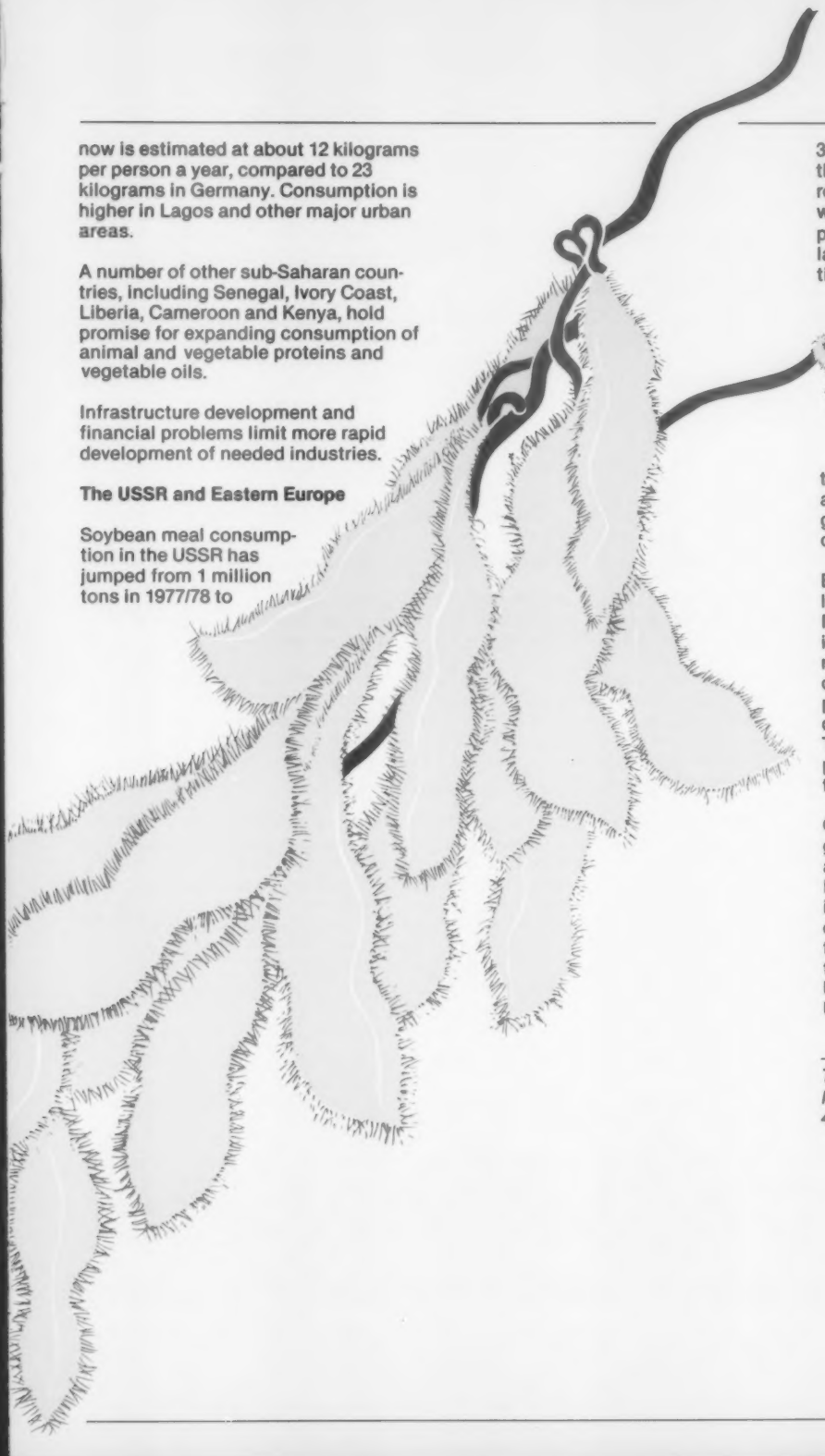
This part of the world also holds promise for further strong development of soybean and products consumption. Demand for animal and vegetable proteins is surging—especially in Algeria, Tunisia, Egypt and Turkey.

Commercial livestock production in these countries is still in the developmental stages, hindered by lack of feed materials and industry infrastructure. The governments of these countries are striving to meet the nutritional needs of their populations. More poultry, dairy products and vegetable proteins will be needed.

South of the Sahara Desert, Nigeria is the largest of several potential markets for soy commodities. Nigeria's population is estimated at 80-100 million. Its poultry industry is in its infancy, but the government is providing strong incentives to expand production. Broiler numbers are increasing 10-15 percent a year. Demand for soybean meal will increase sharply if the industry continues to develop.

Nigeria also is a strong potential market for soybean oil. Consumption of vegetable oils





now is estimated at about 12 kilograms per person a year, compared to 23 kilograms in Germany. Consumption is higher in Lagos and other major urban areas.

A number of other sub-Saharan countries, including Senegal, Ivory Coast, Liberia, Cameroon and Kenya, hold promise for expanding consumption of animal and vegetable proteins and vegetable oils.

Infrastructure development and financial problems limit more rapid development of needed industries.

The USSR and Eastern Europe

Soybean meal consumption in the USSR has jumped from 1 million tons in 1977/78 to 3.6 million tons this year. It appears that a decision has been made to rectify the feed protein deficiencies which have plagued Soviet livestock production for so many years. Although latent demand is still great, the question is whether expansion can continue at the rate of the past few years. The constraints would be structural, technological and industrial, rather than financial.

If the Soviet authorities continue to allocate the resources needed to import larger quantities of soybeans and meal, this will mean continued growth in consumption of meats and dairy products in the USSR.

Eastern Europe is another area where large latent demand exists. Yugoslavia, Poland and Romania have potential for increased livestock production. For the most part, however, large external debts continue to plague the East European economies, and this frustrates domestic economic development. Thus, consumption of soybeans and products in Eastern Europe is expected to grow, but at a slow or modest rate.

Overall, there is considerable room for growth in consumption of soybeans and products worldwide. The challenge lies in converting potential demand into effective demand. Meeting that challenge is going to require a long-term market development effort, but the investment should be worthwhile to U.S. soybean growers and to the entire U.S. economy. ■

The author is with the Oilseeds and Products Division, FAS. Tel. (202) 447-8809.

Country Briefs

Egypt

Drive for Livestock Self-Sufficiency Under Way

Meat demand continues to outstrip supply in Egypt, and imports are being accorded only a minor role in filling the gap. Government policy instead is to reach self-sufficiency in livestock production over the next five years.

To this end, the government has announced a five-year program to fatten water buffalo calves to 400-500 kilograms liveweight instead of the average 60 kilos at which they now are killed and sold as expensive veal.

During 1984, government-owned companies are contracting with farmers to raise 50,000 calves on subsidized milk replacers and feed them to the desired weight. Each year, 50,000 more calves will be fattened, until the total is up to 250,000 a year in 1988. If the plan is a success, red meat production in Egypt should increase substantially, especially if the private sector also adopts this new system of meat production. — *Clancy V. Jean, Agricultural Counselor, Cairo.*

India

Wheat Needs Likely To Increase

After a lapse of five years, India re-emerged as a major wheat importer during the 1980s, importing 2.3 million tons in 1981, 4.0 million in 1982, and 2.1 million in 1983. An expected record-large crop and sizable stocks may limit imports in 1984, but beyond that, India is likely to remain an on-again, off-again wheat importer.

With normal weather conditions, India's wheat production usually is just sufficient to meet domestic demand. Given poor weather, production could fall short of domestic demand, necessitating imports or a drawdown of government stocks.

The United States traditionally has been a big supplier of wheat to India, supplying 67 percent of the country's imports in 1981/82 (July-June), 100 percent in 1982/83, and 55 percent in 1983/84. Because the United States produces types of wheat that India requires, such as hard red winter and white wheat, it should remain a major supplier in future years. Moreover, the United States is viewed as a more reliable supplier in the world wheat market than Canada and Australia.

India's import policy does not permit imports of processed foods, which limits the scope for promoting value-added wheat products such as flour or baked goods. Per capita consumption of bakery products in India is low, estimated at 250 grams of biscuits and 500 grams of bread a year, compared with 50-100 kilograms in most developed countries. Bakery products are still viewed by most Indians as luxury items—and at present, consumption of these products is largely confined to high- and middle-income groups in urban areas. However, with increased urbanization, the demand for bread and biscuits probably will increase because of their significance as convenience foods. — *W. Garth Thorburn, Agricultural Counselor, New Delhi.*

Malaysia

Wheat Use Growing

The growing popularity of western-style wheat products, and the possibilty of greater wheat feeding, suggests continued growth in Malaysian wheat imports this marketing year. Malaysia imports all of its wheat, and its purchases have risen from about 300,000 tons in the mid-1970s to over 550,000 tons in recent years.

Although rice remains Malaysia's staple food, wheat products are becoming more and more popular with the country's growing urban middle class. Instant noodles stand out as the largest growth item within the range of wheat products. However, sandwiches, hamburger rolls, and various kinds of filled rolls and doughnuts also are gaining in popularity.

Wheat consumption in Malaysia could also increase this season and next because of increased use of wheat for feed. Some mills have imported feed wheat in the past when it was priced favorably vis a vis corn, which it is this year. Australia, with large amounts of feed wheat to sell this year, will be competing vigorously in this market. —*Mary Ponomerenko, FAS. (202) 447-2009.*

☆ U.S. GOVERNMENT PRINTING OFFICE: 1984-420-928:311-FAS

Nigeria

Good Opportunities For U.S. Cotton

Nigeria may import about 185,000 bales of cotton in 1983/84, and about the same quantity in 1984/85, if sufficient foreign exchange is available. Domestic output has been curtailed by drought, degenerating seed varieties and competition from food crops. The large gap between demand and domestic supply is creating good opportunities for U.S. exporters—and during the first six months of the current year, U.S. exports to Nigeria were 28,906 bales. Most Nigerian mills are seeking 1-1/16 inch middling.

Because the textile industry is Nigeria's largest employer, the government is anxious to encourage larger cotton production in the years ahead. A number of production incentives have already been introduced, such as free distribution of seed and insecticides, a loan scheme to provide large-scale farmers with advance payment of 50 percent of their anticipated revenue, construction of 1,000 permanent cotton markets no more than 10 kilometers from farmers and a direct buying program to replace licensed buying agents. *—Christopher E. Goldthwait, Agricultural Attache, Lagos.*

Philippines

Wheat Imports To Be Trimmed

The present economic crisis and resulting foreign exchange shortage has increased pressure on the government to trim expenditures for wheat imports. As a result, 1984 is likely to see a reversal in the long-term upward trend in the Philippines' wheat imports and consumption. Declines of 15 percent in imports and 10 percent in use currently are projected.

The present economic and financial situation also is expected to check the proliferation of western-style fast food outlets. Consumption of higher priced baked goods—such as cakes and pastries—could also be curtailed as a shortage of flour causes bakers to concentrate on basic lines such as pan de sal and bread. *—Verle E. Lanier, Agricultural Counselor, Manila.*

SUBSCRIPTION ORDER FORM

Please print or type

Write check payable to:
Superintendent of Documents

MAIL ORDER FORM TO:

Superintendent of Documents
Government Printing Office
Washington, D.C. 20402

For Office Use Only

Quantity Charges

_____ Publications _____
_____ Subscriptions _____
Special Shipping Charges _____
International Handling _____
Special Charges _____
OPNR _____
_____ UPNS
_____ Balance Due
_____ Discount
_____ Refund

Enter My Subscription To FOREIGN AGRICULTURE

@16.00 domestic (United States and its possessions); $20.00 foreign. The Government Printing Office requires that foreign addressees send international money orders, UNESCO coupons, or checks drawn on a domestic bank only.

Enclosed is $_____
☐ Check
☐ Money order
☐ Charge to my Deposit Account
No. _____
Order No. _____

Credit Card Orders Only (Visa and Mastercard)
Total charges $
Credit card No.
Expiration Date Month/Year

Name—First, Last
Company Name or Additional Address Line
Street Address
City State Zip Code
Country

United States
Department of Agriculture
Washington, D.C. 20250

OFFICIAL BUSINESS

Penalty for Private Use, $300

Third Class
Bulk Rate
Postage & Fees Paid
USDA-FAS
Permit No. G-262

FA SERIA300SB1SSDUE008R 1
SERIALS PROCESSING
XEROX UNIV MICROFILMS
300 N ZEEB RD
ANN ARBOR MI 48106